

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

**14. Enter a Blanket Purchase Agreement -  
Master**

- |             |                                   |  |
|-------------|-----------------------------------|--|
| <b>14.1</b> | <b>Introduction</b>               | This procedure describes the process to establish a BPA Master in CSPS. The BPA Master is entered via the CSPS screen "Purchase Order Screen" (FM041 p1).  |
| <b>14.2</b> | <b>Who Performs the Procedure</b> | Procurement personnel will be responsible for establishing the BPA Master.   |
| <b>14.3</b> | <b>Initiating the Process</b>     | The BPA Master process begins when a new BPA is required or when the existing BPAs need to be re-established.  |
| <b>14.4</b> | <b>Accessing the System</b>       | From the Main Menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select "FMR041 - Purchase Order Preview Screen". Follow the steps below for entering a BPA Master on FMR041 and FM041. |

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- 14.5 Entering a BPA Master** This procedure describes the steps necessary to enter a BPA Master.

*FMR041 - BPA Master*

PURCHASE ORDERS / BPA						
-----OBLIGATION DOCUMENT-----						
NUMBER	TYPE	STATUS	BPA	VENDOR NAME	PLACED	LAST MODIFIED
942	0	0	POMAST	OPEN	Y	N 26-FEB-1999
936	0	0	PO	OPEN	Y	N 23-FEB-1999
928	0	0	POMAST	OPEN	Y	Y 19-FEB-1999
927	0	0	POMAST	OPEN	Y	Y 19-FEB-1999
926	0	0	POMAST	OPEN	Y	N 19-FEB-1999
925	0	0	PO	OPEN	Y	N 19-FEB-1999
920	0	0	PO	OPEN	Y	N 17-FEB-1999
919	0	0	PO	OPEN	Y	N 17-FEB-1999
918	0	0	PO	OPEN	Y	Y 16-FEB-1999
876	0	0	POMAST	OPEN	Y	Y 04-FEB-1999

ACTION LIST  
BPA - Master

VIEW/EDIT NEW PO NEW BPA MASTER NEW BPA CALL AMEND (C/O)

STEP	ACTION
<b>FMR041 - Purchase Order Preview Screen</b>	
1.	Click on the <b>NEW BPA MASTER</b> button to create a new BPA Master.
2.	FM041 appears.

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*FM041 - BPA Master*

**Purchase Order (FM041 p1)**

☐ 1 PR TO 1 PO      1 TO 1 PR DOC NO      DOC COMPLETE

DOC TYPE     AWARD TYPE     ☐ MOD    BPA     FEEDER SYS NO

OBLIG #             G/L     FY     TOTAL

DOC DATE     REF    NOT TO EXCEED

EFFECTIVE FROM     TO    STATUS     AS OF

BUREAU     NOAA

VENDOR     1    GENERAL ANALYTICS CORPORATION

ESTIMATED CONTRACT LIFE \$

☒ APPROVED    S TRAIN1    24-JUN-1999

ORIGINATING OFFICE

CONT OFC     NOTES    CLAUSES    ATTACHS    ROUTING

REPORT    FORWARD    NEXT    PREV    CANCEL

STEP	ACTION
<b>FM041 p1 - Purchase Order Main Screen</b>	
1.	The <b>1 PR TO 1 PO</b> field is non-enterable on a BPA Master.
2.	The <b>1 TO 1 PR DOC NO</b> field is a system generated field that is blank.
3.	The <b>DOC COMPLETE</b> field is system generated and is populated when the BPA Master, including the applicable reporting data, is complete and when the Buyer has clicked on approval.
4.	The <b>DOC TYPE</b> field defaults to 'PO'. Double click on the field to access a list of document types and select 'POMAST'. This is the correct document type for a BPA Master.
5.	The <b>AWARD TYPE</b> field defaults to '40'. Double click on the field to access a list of award types and select '45'. This is the correct award type for a BPA Master.
6.	The <b>MOD</b> field is non-enterable when creating a BPA Master.

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STEP	ACTION
7.	<p>The <b>BPA</b> field will default to 'Y' and should not be changed.</p> <p>Note: While this field can be changed to 'N', the document will not be able to processed or awarded.</p>
8.	<p>In the <b>FEEDER SYS NO</b> field, reference a source document generated by a cuff or feeder system.</p>
9.	<p>Tab past the <b>OBLIG #</b> field.</p> <p>Note: The <b>OBLIG #</b> field is system generated and displays the three field CSPS/CFS purchase order document number. The three fields are: 1) the primary CSPS/CFS document number, 2) the release number (a sequential number used to identify BPA calls against the BPA master), and 3) the modification number. The BPA Master number is assigned when a new BPA Master created. The numbers come from the same numbering queue as the other purchase order numbers.</p>
10.	<p>The <b>G/L</b> field defaults to the last day of the current month and indicates the General Ledger month-end recording date for this transaction. Although the default entry can be overridden by selecting another valid entry from the list-of-values, the default date will generally be the correct date.</p>
11.	<p>The <b>FY</b> field defaults to the current fiscal year and indicates the Fund Code / Fiscal Year combination against which this transaction should be applied. Although the default entry can be overridden by entering another fiscal year, the default date will generally be the correct date.</p>
12.	<p>The <b>TOTAL</b> field is system generated and displays the total dollar amount of all line items entered on the BPA Master. Since funds are not obligated when the BPA Master is entered, the field will display \$.00.</p>
13.	<p>The <b>DOC DATE</b> field is system generated and displays the current day's date. This <b>DOC DATE</b> indicates the date the document was created.</p>
14.	<p>In the <b>REF</b> field, enter information that can be used to distinguish this BPA Master (e.g., BPA - (vendor name)). This will facilitate querying the BPA Master.</p>
15.	<p>In the <b>NOT TO EXCEED</b> field, enter the ceiling for the amount of money that can be associated with the BPA Master. This field is required and will default into any subsequent BPA Calls as the <b>ESTIMATED CONTRACT LIFE \$</b>.</p>

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STEP	ACTION
16.	<p>The <b>EFFECTIVE FROM</b> field defaults to the current date but can be overridden. Because there is no functionality associated with this date within the system, this field can be used at the buyer's discretion to document the beginning effective date of the order, the award date, etc.</p> <p>Note: The <b>EFFECTIVE FROM</b> and <b>EFFECTIVE TO</b> (see below) dates do not print on the CD-404 and are not intended to identify the "period of performance" <u>for the vendor</u>. Neither field has any financial effect. The period of performance information should be identified for the buyer in the line item <b>DESCRIPTION</b>.</p>
17.	<p>The <b>EFFECTIVE TO</b> field defaults to 'blank' but can be overridden. In general, this field can also be used at the buyer's discretion to document an ending effective date (if applicable).</p>
18.	<p>The <b>STATUS</b> field is system generated and defaults to 'OPEN' for new transactions.</p> <p>Note: The system does not update the <b>STATUS</b> on a BPA Master.</p>
19.	<p>The <b>AS OF</b> field is system generated and indicates the date the document's <b>STATUS</b> was last updated.</p>
20.	<p>The <b>BUREAU</b> field will default based on the buyer's bureau code. At this time, see section 11-5, Step 20 for further detail.</p> <p>Note: This can be overridden. By double clicking in the field, a list of active Bureau codes will pop up. Double click on the desired bureau or highlight the desired bureau and click the "OK" button to select a different bureau code.</p>

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STEP	ACTION
21.	<p>The buyer must select the correct <b>VENDOR</b> from the list of CFS vendors.</p> <p>a. To the right of the <b>VENDOR</b> field name are three untitled boxes. If the vendor number is known, then it can be entered directly into the first box. Otherwise, type the first word of the vendor into the third box and select enter. The system will display a list all vendors with that name. Highlight the appropriate vendor and click "OK".</p> <p>Note: A vendor must be established in the CFS vendor database prior to award.</p> <p>b. The <b>DUNS NO</b> field defaults based on the vendor information stored in CFS for the selected vendor. The <b>DUNS NO</b> is the vendor's Dun &amp; Bradstreet identification number. If this number is incorrect, it must be modified via the CSPS/CFS "Vendor Maintenance Screen" (PM002).</p> <p>c. The <b>CONTACT</b> field defaults based on the vendor information stored in CFS for the selected vendor. The buyer can modify this field to identify a contact for this BPA.</p> <p>d. The <b>FOB</b> field defaults based on the vendor information stored in CFS for the selected vendor. <b>FOB</b> or "Freight on Board" indicates the terms of shipment. Valid entries are 'ORIGIN' or 'DESTIN'. The buyer can modify this field to indicate the specific terms for the BPA.</p> <p>e. In the <b>VIA</b> field, double click on the field to view the list of shipment methods. Select the correct shipment method and then click "OK". This field is optional.</p> <p>f. In the <b>FREIGHT TERMS</b> field, enter the terms required for freight. This field is optional.</p>

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STEP	ACTION
	<p>g. The <b>EXCHANGE COUNTRY CODE &amp; RATE</b> fields default based on the vendor information stored in CFS for the selected vendor. The displayed information identifies the vendor's country code and the currency exchange rate for payments. The buyer can modify these fields to indicate the specific terms for the BPA.</p> <p>h. The <b>TERMS1</b> fields default based on the vendor information stored in CFS for the selected vendor. The buyer can modify these fields to indicate the specific terms for the BPA.</p> <p>(i) In the <b>NET DAYS</b> field, indicate the number of days within which total payment is due after the invoice is received.</p> <p>(ii) In the <b>DISCOUNT</b> fields, indicate whether a percentage or flat dollar amount discount is offered by entering 'P' or 'A' and then indicate the corresponding percentage or amount.</p> <p>(iii) In the <b>W/IN</b> field, indicate the number of days after the invoice is received that the discount is valid.</p> <p>i. The <b>TERMS2</b> fields also default based on the vendor information stored in CFS for the selected vendor. These fields indicate a second set of terms offered by the vendor and can be modified by the buyer for each specific order.</p> <p>j. Once the vendor information is complete, click the "PREV" button to return to FM041 p1.</p>
<b>FM041 p1 - Purchase Order Screen</b>	
<b>22.</b>	The <b>CONT OFC</b> field is system generated and displays the buyer's contracting office code. This field cannot be modified.
<b>23.</b>	<p>In the <b>NOTES</b> field, double click on the field to access a text editor and record comments pertaining to the BPA Master. The field holds up to 240 characters. Click "OK" to save changes or "CANCEL" to ignore changes and return to FM041 p1.</p> <p>Note: If notes are recorded, the <b>NOTES</b> field on FM041 p1 will display an 'X'.</p>

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STEP	ACTION
24.	<p>In the <b>CLAUSES</b> field, double click on the field to open the Alternative Clauses (FM041f) screen and identify FAR clauses and/or user defined line notes that are applicable to thisBPA Master.</p> <p>a. In the <b>CLAUSE #</b> field, double click on the first blank row to view the list of FAR clauses and line notes. Select a clause/line note and click “OK”.</p> <p>b. The <b>CLAUSE FLAG</b> field defaults either to ‘Y’ if the item selected in ‘Step a’ is a FAR clause or to ‘N’ if the item selected in ‘Step a’ is a line note.</p> <p>Note: Clauses will print in the “Terms and Conditions” block of the CD-404 and line notes will print after the final line item on the CD-404.</p> <p>c. The <b>SHORT DESCR</b> field defaults based on the clause or line note selected in ‘Step a’. Double click on the field to open the text editor and view the short description of the clause or line note. Click “OK” to return to FM041f.</p> <p>d. The <b>FULL TEXT</b> field defaults based on the clause or line note selected in ‘Step a’. Double click on the field to open the text editor and view the entire clause or line note (if applicable). Click “OK” to return to FM041f.</p> <p>e. Repeat ‘Steps a - d’ for each clause or line note that must be referenced on the purchase order. When all of the necessary clauses and line notes have been identified, click the “PREV” button to return to FM041 p1.</p> <p>Note: If clauses/line notes are incorporated, the <b>CLAUSES</b> field on FM041 p1 will display an ‘X’.</p>



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STEP	ACTION
25.	<p>In the <b>ATTACHS</b> field, double click to open the Attached Documents (FM041c) screen and record the location of supporting documents on the LAN, if applicable.</p> <p>a. In the <b>NAME</b> field, record the name of the file, including the extension.</p> <p>b. In the <b>LOCATION</b> field, record the drive and path where the document is located.</p> <p>c. Repeat 'Steps a - b' for each supporting document. When all of the documents have been referenced, click the "PREV" button to return to FM041 p1.</p> <p>Note: If supporting documents are referenced, the <b>ATTACHS</b> field on FM041 p1 will display an 'X'.</p>
26.	The <b>ROUTING</b> field is system generated and defaults to 'N' (i.e., 'No'). Once the BPA Master is approved by the buyer on the FM041 screen, the system automatically updates the field to 'Y'.
27.	Once all of the required information on FM041 p1 is complete, click the "NEXT" button to open FM041 p2 - The Line Items Screen.
<b>FM041 p2 - The Line Items Screen</b>	
28.	The <b>LINE #</b> field is system generated as a zero and identifies the single line item on the BPA Master. Neither a header nor a footer may be entered on a BPA Master.
29.	<p>The <b>DESCR</b> field is the only field on FM041 p2 which can be entered and is required. Double click on the field to access a text editor and enter the line item description. The field holds up to 9 pages of text. Click "OK" to save change or "CANCEL" to ignore changes and return to FM041 p2.</p> <p>Once the Description information is complete, click the "PREV" button to return FM041 p2.</p>
<b>FM041 p1 - The Main Screen</b>	
30.	The <b>ESTIMATED CONTRACT LIFE \$</b> field is system generated and defaults to equal the <b>NOT TO EXCEED</b> 's dollar value. This field is non-enterable.

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STEP	ACTION
31.	Reference procedures “Section 11.5 - Entering a Purchase Order (not Based on a Purchase Request or RFQ)” Step 51 for details on using the Document Review Routing feature. As a policy, any BPA Master must go through the review process prior to the approval process.
32.	Click the <b>APPROVED</b> field again to indicate that the document is complete and that the reporting/approval process can begin. The system will display the applicable reporting screen. See below to complete Section 14.6 “Completing the SF-281 Report” or Section 14.7 “Completing the CD-409 Report” to completed the reports.

- 14.6 Completing the SF-281 report** This procedure describes the steps necessary to enter the SF-281 reporting information. This information is required for BPA Master Awards with a total estimated dollar amount of \$25,000 or less and in cases which modifications have been made regardless to the value of the orders. The system will edit the code as it is being input or once the approval button is checked. The system will then specify the errors to be corrected.

STEP	ACTION
1.	In the <b>ORDER TYPE</b> field, select the applicable order type. Double click on the field to access a list of valid order types.
2.	In the <b>TYPE OF CONTRACTOR</b> field, select the valid contractor type code. Double click on the field to access a list of valid contractor type codes.
3.	In the <b>CONTRACT KIND</b> field, enter the valid contract action type entry. Double click on the field to access a list of valid contract kinds.
4.	In the <b>PREFERENCE PROGRAM</b> field, select the correct preference program code. Double click on the field to access a list of valid preference program codes.
5.	In the <b>COMPETITION</b> field, identify the extent of competition for the purchase order. Double click on the field to access a list of valid ranges.
6.	In the <b>PRODUCT &amp; SERVICES CODE</b> field, select the appropriate PSC code. Double click on the field to access a list of PSC codes.

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STEP	ACTION
7.	The <b>DOCUMENT NO</b> , <b>MODIFICATION NO</b> , and <b>AGENCY</b> fields are all system generated.
8.	In the <b>AWARD DATE</b> field, enter the current date. The date must be entered as "DD-MON-YYYY".
9.	The <b>REPORTING PERIOD</b> and <b>DOLLARS OBLIGATED</b> fields are both system generated.
10.	In the <b>ORDERED AGAINST</b> field, enter the contract ordered against number (i.e., the GSA schedule number, the DOC contract number, etc.), if applicable. This field will not be enterable for certain types of orders.
11.	In the <b>PMAT SAVINGS \$</b> field, enter the performance measurement analysis tool savings amount.
12.	In the <b>PMAT SAVINGS CAT</b> field, enter the appropriate performance measurement analysis tool savings category selection. Double click on the field to access a list of all savings category selection codes.
13.	In the <b>PMAT COMPLEXITY</b> field, enter the correct value for the performance measurement analysis tool complexity category. Double click on the field to access a list of all valid selections.
14.	Upon completing all fields on the SF-281, press the space bar or click the mouse to check the <b>DATA COMPLETE</b> field.
15.	Click the "PREV" button to complete the document approval processes.  Note: To begin the document approval process, the buyer must: 1) click the <b>APPROVED</b> button on FM041 p1 to enter the applicable reporting screen, 2) enter all of the reporting data and click <b>DATA COMPLETE</b> , and 3) click the "PREV" button.

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- 14.7**      **Completing the CD-409 report**      This procedure describes the steps necessary to enter the CD-409 reporting information. This information is required for BPA Master Awards with a total estimated dollar amount greater than \$25,000 or modifications to those orders regardless of value.

STEP	ACTION
1.	The <b>REPORTING AGENCY</b> field, is a system generated field which defaults in with the appropriate value.
2.	In the <b>RECORD TYPE</b> field, select the applicable record type. Double click on the field to access a list of valid record types.
3.	In the <b>ORDER TYPE</b> field, select the proper order type. Double click on the field to access a list of valid order types.
4.	In the <b>DAO</b> field, enter 'Y' if this order is a departmental administrative order or enter 'N' if this order is not a departmental administrative order.
5.	The <b>DOCUMENT NO</b> , <b>MODIFICATION NO</b> , and <b>CONTRACTING OFFICE</b> fields are all system generated.
6.	In the <b>AWARD DATE</b> field, enter the current date. The date must be entered as "DD-MON-YYYY".
7.	In the <b>CONTRACT ACTION</b> field, enter the valid contract action code. Double click on the field to access a list of valid contract action codes.
8.	In the <b>ORDERED AGAINST</b> field, enter the contract ordered against number (i.e., the GSA schedule number, the DOC contract number, etc.) if applicable. This field may not be enterable for certain types of orders.
9.	In the <b>READY REQ DATE</b> field, enter the current date. The date must be entered as "DD-MON-YYYY".
10.	The <b>EST CONTR LIFE \$</b> field should default based on the estimated contract life amount on FM041 p1.
11.	The <b>OBL \$</b> , and <b>OBL TYPE</b> are all system generated.
12.	In the <b>P&amp;S CODE</b> field, select the appropriate PSC code. Double click on the field to access a list of valid PSC codes.

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STEP	ACTION
13.	In the <b>SIC CODE</b> field, select the appropriate SIC code. Double click on the field to access a list of valid SIC codes.
14.	In the <b>COMM ITEM</b> field, enter 'Y' if the purchase order item is a commercial item acquisition. If the purchase order item is not a commercial item acquisition, enter 'N'.
15.	In the <b>RGA</b> field, enter 'Y' if the purchase order is a revenue generating agreement. If the purchase order is not a revenue generating agreement, enter 'N'.
16.	In the <b>FOREIGN</b> field, enter 'Y' if a foreign country helped finance this action. If a foreign country did not help finance this action, enter 'N'.
17.	In the <b>MULTI YEAR</b> field, enter 'Y' if this is a multi-year contract. If the purchase order action is not a multi-year contract, enter 'N'.
18.	The <b>VENDOR: DUN #, NAME, PHONE, DIVISION, ADDRESS, ADDRESS2, CITY, STATE, and ZIP CODE</b> fields are all system generated.
19.	In the <b>PPP: STATE/COUNTRY</b> field, select the proper state or country abbreviation. Double click on the field to access a list of valid selections.
20.	In the <b>CITY/COUNTY</b> field, select the corresponding city/county. Double click on the field to access a list of valid selections.
21.	Click on the NEXT button to go to Page 2 of the CD-409 Reporting Information.
22.	In the <b>MFRG COUNTRY</b> field, select the appropriate country of manufacture. Double click on the field to access a list of valid selections.
23.	In the <b>SYNOPSIS CODE</b> field, select the appropriate synopsis category code. Double click on the field to access a list of valid selections.
24.	In the <b>CONTRACT TYPE</b> field, select the appropriate contract type. Double click on the field to access a list of valid selections.
25.	In the <b>CICA</b> field, select the appropriate <b>CICA</b> applicability code. Double click on the field to access a list of valid selections.
26.	In the <b>SOLICIT PROCED</b> field, select the appropriate solicitation procedures code. Double click on the field to access a list of valid selections.
27.	In the <b>NON-COMPETE AUTH</b> field, select the appropriate authority code. Double click on the field to access a list of valid selections.

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STEP	ACTION
28.	In the # <b>OFFERS</b> field, select the appropriate offers received code. Double click on the field to access a list of valid selections.
29.	In the <b>EXTENT COMPETED</b> field, identify the extent of competition for the purchase order. Double click on the field to access a list of valid ranges.
30.	In the <b>CONTRACTOR TYPE</b> field, select the appropriate contractor type code. Double click on the field to access a list of valid selections.
31.	The <b>MINORITY</b> field defaults in as the appropriate value.
32.	The <b>WOMAN-OWNED</b> field defaults in as the appropriate value.
33.	In the <b>PREFERENCE PROGRAM</b> field, select the appropriate preference program code. Double click on the field to access a list of valid code.
34.	In the <b>SUBCONTRACT PLAN</b> field, select the appropriate subcontracting plan code. Double click on the field to access a list of valid selections.
35.	In the <b>LABOR STATUTES</b> field, select the appropriate labor statutes code. Double click on the field to access a list of valid selections.
36.	In the <b>EST COMPLETION DATE</b> field, enter the estimated completion date. The date must be entered as “DD-MON-YYYY”.
37.	The <b>VENDOR TIN, COMMON PARENT NAME, COMMON PARENT TIN, CONTRACT SPEC INITIALS, CONTRACTING OFFICER</b> and <b>PHONE</b> fields are all system generated.
38.	In the <b>COTR</b> field, enter the Contracting Officers’s Technical Representative’s Name. This field is optional.
39.	In the <b>PMAT SAVINGS \$</b> field, enter the correct performance measurement analysis tool savings amount.
40.	In the <b>PMAT SAVINGS CAT</b> field, enter the appropriate performance measurement analysis tool savings category selection. Double click on the field to access a list of all savings category selection codes. This will not be available if no savings have been entered.
41.	In the <b>PMAT COMPLEXITY</b> field, enter the correct value for the performance measurement analysis tool complexity category. Double click on the field to access a list of all valid selections.
42.	Upon completing all fields on the CD-409, press the space bar or click the mouse to check the <b>DATA COMPLETE</b> field.

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STEP	ACTION
43.	<p>Click the “PREV” button to complete the document approval processes.</p> <p>Note: To begin the document approval process, the buyer must: 1) click the <b>APPROVED</b> button on FM041 p1 to enter the applicable reporting screen, 2) enter all of the reporting data and click <b>DATA COMPLETE</b>, and 3) click the “PREV” button.</p>

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## 14.8 Printing (Running) the CD-404 Report

This procedure describes the steps necessary to run the “PR701 - CD-404 Purchase Order” report to print the BPA Master.

STEP	ACTION
1.	<p>To run the “PR701 - CD-404 Purchase Order” report,</p> <ol style="list-style-type: none"> <li>1. Click the “Printer” icon in the toolbar while the FM041 p1 window is open and active,</li> <li>or</li> <li>2. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR701 - CD-404 Purch Order”.</li> </ol>
2.	See Section 11.13 “Running the CD-404 Report” for further detail on how to execute the report.

## 14.9 Printing (Running) the SF-281 Report

This procedure describes the steps necessary to run the “PR703 - SF-281 Contract Summary” report.

Note: This quarterly report should be run only by designated individuals within the Bureau.

<b><u>STEP</u></b>	<b><u>ACTION</u></b>
<b>1.</b>	To run the “PR703 - SF-281 Contract Summary” report,  From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR703 - SF-281 Contract Sum”.
<b>2.</b>	See Section 11.14 “Running the SF-281 Report” for further detail on how to execute the report.



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- 14.10      Printing (Running) the CD-409 Report**      This procedure describes the steps necessary to run the “PR702 - CD-409 Contract Action” report.

STEP	ACTION
1.	To run the “PR702 - CD-409 Contract Action” report,  From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR702 - CD-409 Contract Act”.
2.	See Section 11.15 “Running the CD-409 Report” for further detail on how to execute the report.